



WISCAT User Group Meeting
July 26, 2017



Hi everyone, thanks for joining us today. I'm Ben Miller, assistant director of Resources for Libraries and Lifelong Learning. I'm here with Christine Barth, Elizabeth Neuman, and Gail Murray. We have a fairly short agenda today, but some items in particular may take awhile. That said, like most WISCAT user group meetings, we probably won't use the full hour. The first portion -- the part here where we're going through slides -- will be recorded and will be made available later.

Agenda

- WISCAT news
- Notes on 7/11 update
- Update Q&A
- Multi-Copy Requests
- Documentation/FAQ needs
- General Q&A



For our agenda today, we'll be going over some general WISCAT news and housekeeping stuff, then the notes on the July 11th Auto-Graphics update. After that, we'll talk about multi-copy requests, and finally, documentation and FAQ needs, followed by questions. Feel free to enter questions in the chat during this first bit so you don't forget them and we'll answer them at the end.

WISCAT News

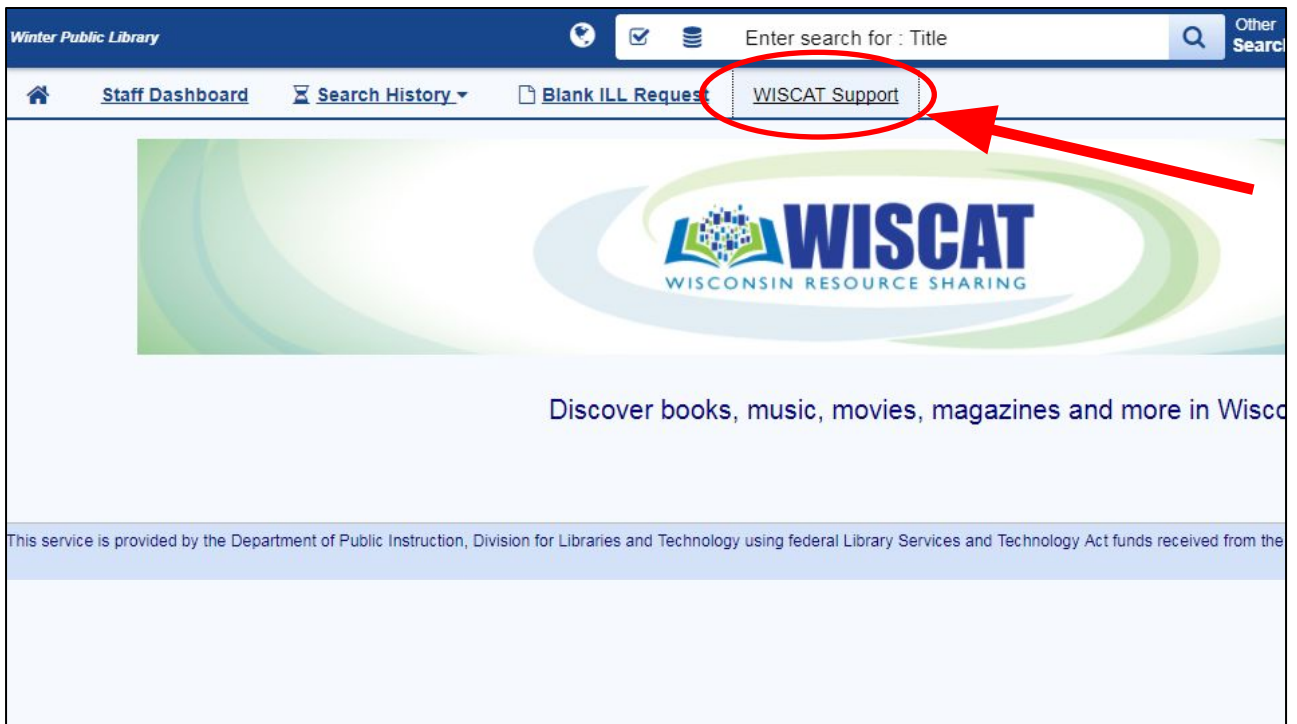
- Comings & Goings
- GlobalMeet/Skype news
- Support Form URL -
<https://dpi.wi.gov/rl3/resources/resource-sharing/contact-us>
- Support email address -- dpirlill@dpi.wi.gov



For our news, as you're probably aware, we've had some staff changes in the past months. Vickie Long, our longtime WISCAT technical guru, retired back in March. Gail Murray is the new WISCAT Technical Coordinator as of about a month ago. (Hi everyone!). You'll be hearing more from Gail a bit later. Pat Stutz, who worked to refer ILL requests here, retired in May. Prior to that Christine Tiedje, another member of the ILL team who worked to refer requests, transferred to another position within the Department of Public Instruction. We are currently assessing our internal staffing and will potentially be recruiting for a position on our team in the near future, so stay tuned and keep an eye on wisc.jobs and the Library Classified Google Community.

Next up, GlobalMeet/Skype news -- this will be our last meeting using the GlobalMeet platform. The agency now has access to Skype for Business, which will be easier to use, and includes more and better options. We'll be sure to send out lots of helpful training info on Skype before our next user group meeting, but we're excited to make the change.

Finally, if you need any assistance with WISCAT at all and were used to sending emails to Vickie directly, we now asking that you submit them via our online support form or send them to our shared inbox - dpirlill@dpi.wi.gov. This way, the appropriate person from the team can respond, and if one person is out, your message won't languish until they get back.



The easiest way to get help is to use the link from your own WISCAT. Every library should have a WISCAT Support Form link available when they log in. Feel free to ask questions, report issues, or even send us your success stories if you want. Our support form allows you to upload a file, so if you're able to grab a screenshot, please include it. That will help us troubleshoot your problem more quickly and efficiently.

Now I'll turn it over to Gail who will lead the discussion on the recent update.

Notes on 7/11 update

Major changes:

- Participant record helps
- Blank ILL request improvements
- Patron self-registration
- Caution notice when changing status
- Turn off/on Type Ahead feature
- Changes to tablesorter



Hi everyone. We wanted to take some time to go through each of the enhancements and changes that came out of the July 11th Auto-Graphics update. Some of them turned out to be bigger changes than we initially imagined, and one of them we unfortunately left off our release notes that were shared out -- that last one in the list there, changes to tablesorter. Our apologies for leaving that one off. For every update, we go through the release notes provided to us from Auto-Graphics and figure out which updates will have an impact on WISCAT users, and then we make our own version of release notes, so that we aren't sharing out lots of information that doesn't apply at all to our particular setup here in Wisconsin. So, our apologies for mistakenly leaving the changes to the tablesorter off of the release notes we put together. We'll go over that one last, and we're happy to take questions once we've gone over each of the changes.

Participant Record Helps

The screenshot shows the 'Maintain Participant Record' interface. At the top, there's a search bar and a breadcrumb trail: 'ILL Admin > Maintain Participant Record'. Below this, a row of tabs includes 'Lender Info', 'Contact Info', 'Holiday List', 'ISO', 'Usernames', 'Related Info', and 'Patron Not'. A second row of tabs includes 'Lending', 'Shipping', 'ILL Acceptance', and 'Copies'. The 'Lender Info' tab is active. It contains a 'Select to display to' dropdown and several input fields: 'Library Code', 'Library Name', 'Library Type' (a dropdown menu currently set to 'None'), 'Agency Code', 'Broker Code', 'Days to Respond' (set to 4), 'Ref Request Default', 'Days to Supply' (set to 14), and 'Days to Return' (set to 35). At the bottom, there's a section for 'Days Requests are Processed' with checkboxes for each day of the week: Mon., Tues., Wed., Thu., Fri., Sat., and Sun. Two yellow callout bubbles are present: bubble 1 points to a question mark icon next to the 'Select to display to' dropdown, and bubble 2 points to a 'More Information' link within the 'Library Name' field's help text. The help text for 'Library Name' states: 'Determines how the library functions as a lender. [More Information](#)'.

So, first up is Participant Record Helps. These, just like the name suggests, are only on the participant record. Wherever you see a question mark, indicated by the yellow bubble with the number 1 there, you can click on it to get a short description of what that field really means, what's being asked of you for each section, or what effect changes in that section will have. If you click on More Information in the help text, shown here by yellow bubble number 2, you'll be brought to the Auto-Graphics document that best addresses that topic. So see here, if I click on More Information....

ISO ILL Administration User Guide

Chapter 6. MAINTAINING PARTICIPANT RECORDS

The Participant Record

The Maintain Participant Record function lets you access, view and update Participant Records. Library staff may update the Participant Record for their *own* library. System Administrators are able to update the Participant Record for *any* library in their consortium.

Each participant institution is assigned a unique Library Code by Auto-Graphics. A library's Participant Record contains all the reference information necessary to ensure the proper handling of interlibrary loan activities, including a participant profile, interlibrary loan (ILL) contact information, Preferred Lender List, general lending/ILL policies, operating hours, detailed ILL policy information, and links to related information.

The Participant Record includes a list of lenders to which ILL requests from the participant are submitted. Each entry in the Lender List shows the code assigned by Auto-Graphics for the lending institution. As a System Administrator, you may add lenders to the list, remove lenders from the list, or edit information for any lender in the list. The Days Requests are Processed field lets you indicate the days of the week when the institution is normally open for business. The Holidays List lets you indicate normal business days on which the institution is closed in observance of a holiday. The system uses this information to calculate need-by dates, due dates, etc. You may also add notes to the Participant Record to indicate any special policies the institution holds with regards to interlibrary loan.

Library staff and patrons may view *abbreviated* Participant Records (in *read-only* form) via the Search module, by:

- Searching the Library Information Database



I'm brought to the ILL Admin User Guide, Chapter 6, Maintaining Participant Records. So if I need any further info than what's listed in the help text, I can come here and find what I need.

NCIP/blank ILL request improvements

Move Request with Patron Note to Awaiting Approval?	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Blank ILL Form	<input checked="" type="checkbox"/> Staff <input type="checkbox"/> Patrons <input type="checkbox"/> Institutional <input type="checkbox"/> IP Auth <input type="checkbox"/> IP Auth - Require Login <input type="checkbox"/> Guests <input type="checkbox"/> Guests - Require Login
Show Request This Button	<input checked="" type="checkbox"/> Staff <input checked="" type="checkbox"/> Patrons <input type="checkbox"/> Institutional <input type="checkbox"/> IP Auth <input type="checkbox"/> IP Auth - Require Login <input checked="" type="checkbox"/> Guests <input type="checkbox"/> Guests - Require Login
Uses Mediated Patron Renewal:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Show Item Due Date to Patron:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Patron's due date is	<input type="text" value="3"/> days prior to lender's due date.
Use Holiday List in Calculating Patron's Due Date:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show Patron Willingness To Pay Message:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Blank Request - Disable NCIP Function:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Blank Request - Disable Availability:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display History Information:	<input type="radio"/> Oldest First <input checked="" type="radio"/> Newest First
Calculate Renewed to Date:	<input type="radio"/> Add to original due date <input checked="" type="radio"/> Add to Accept Renewal date
"Any Edition is Acceptable"	<input checked="" type="radio"/> Yes <input type="radio"/> No
Checked as default:	<input type="radio"/> Shipped Status Only <input checked="" type="radio"/> Both Shipped and Returned
Shipping Label Default:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Hide patron data on shipping labels:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Show Patron Note to Lenders:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Display [ILL Lender] to Patrons/Guests:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow patrons to change need-by date	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow patrons to change pickup location	<input checked="" type="radio"/> Yes <input type="radio"/> No
Allow batch request from list	<input checked="" type="radio"/> Yes <input type="radio"/> No



Next up, there's a new feature that will disable NCIP messaging for blank requests and availability checking. Previously, we would see error messages when sending blank requests to NCIP libraries because in order for NCIP to function, a request has to refer to a specific record, which wouldn't exist with a blank request. This new feature disables NCIP messaging for blank requests, so that they can actually make it over to NCIP libraries without skipping over them. We're working with AG to try and get this rolled out to all NCIP libraries without it having to be manually configured by each library. So stay tuned and we'll share out whether that has happened. And just to be clear if it wasn't already, this function is only for use in NCIP libraries.

Blank request reminder!



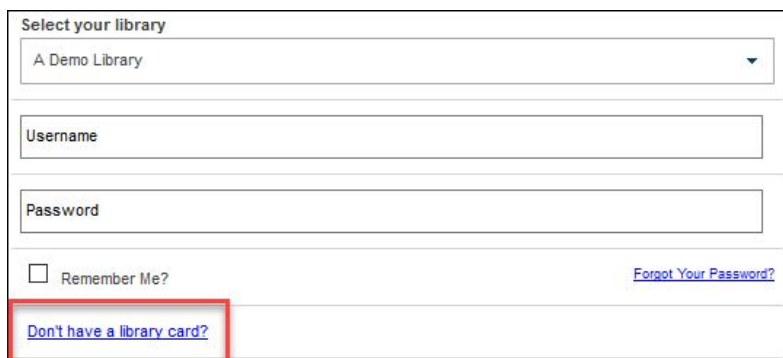
Blank requests should only be used in 4 scenarios:

- Photocopy requests
- Microfilm
- No record
- Book kits



OK, and I know we said we'd just be going over the update for now, but let's pause from our AG release notes for a second and, since we're already talking about blank requests, let's go over the scenarios blank requests can be used in. This is just a reminder PSA, and I'm sure it's familiar to many of you. There are only 4 situations where you should be sending through blank requests: for photocopies of serials, for Microfilm, if a bibrecord for an item doesn't exist, and if you're requesting a book kit. That's it! Ok, now back to the update...

Patron Self-Registration



Select your library

A Demo Library

Username

Password

☐ Remember Me?

[Don't have a library card?](#)

[Forgot Your Password?](#)



There is now an option to set up patron self-registration. Unfortunately I did some testing and it isn't working as intended right now, but I'll tell you how it *will* work, when it *does* actually work. There will be some configuration on the library's end -- this is one part that's still unclear to us, as the release notes don't seem to address all the steps needed for configuration. Once it *is* configured, the option will appear on the login page to click on "Don't have a library card?" -- which will bring users to a form they can fill out to self-register. The *form* is *also* not working as intended right now, so once that's all fixed by AG we'll send out more information on this feature -- how to configure it, and what the process is like on the patron end. In the meantime, just know that this option will soon be functional, if you do decide to go that route.

Caution notice when changing status

ILL Admin > Request Manager -

LENDER'S PENDING LIST

Barcode Processing Submit Reset Close Help

Print All: With Lenders Without Lenders New Requests New Requests with History Pick List

CAUTION: This will update ALL requests with this status. Not just the requests on this page

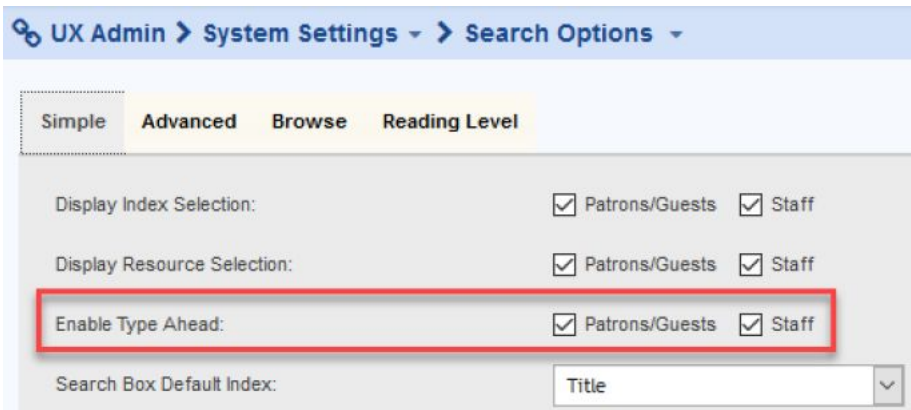
Pending

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Title	Pub Date	Req. No.	Borrower	Status	Reason/Condition
7 clinics with Buck Brannaman	c2012.	2097245		Pending	
7 minutes of magic (DVD) AM & PM routines [videorecording]	c2007.	2098367		Pending	
21 Reasons why christians should speak in other tongues	1971.	2095474		Pending	
2016 re-album IN [sound recording]	[2016].	2098384		Pending	
An adventure	[1955]	2098383		Pending	
Aircraft design : a conceptual approach	[2012]	2095656		Pending	
Alcoholism Treatment Quarterly	2016	2097941		Pending	
All about light and sound	2009.	2097349		Pending	
All summer long [sound recording]	1964.	2095607		Pending	

OK, next AG update: A Caution notice now displays, warning you if you're about to change the status of requests across multiple pages. This shows up on the Status pages in the Request Manager. Previously, this option only changed the status of requests on the page you were viewing, so be aware of that.

Turn off/on Type Ahead feature



UX Admin > System Settings > Search Options

Simple Advanced Browse Reading Level

Display Index Selection: ☒ Patrons/Guests ☒ Staff

Display Resource Selection: ☒ Patrons/Guests ☒ Staff

Enable Type Ahead: ☒ Patrons/Guests ☒ Staff

Search Box Default Index: Title

Next, the Type Ahead feature can now be turned on and off. Some people really love the type ahead feature, others are really not into it. So if you'd like to turn it off, or toggle it back and forth for some reason, now you have the option to do that from Search Options under UX Admin. You can see this setting is checked for both patrons and staff, which means it's turned on.



Changes to tablesorter

BORROWER'S PENDING LIST

CAUTION: This will update ALL requests with this status. Not just the requests on this page.

Print All:

With Lenders

Barcode Processing

Submit

Reset

Close

Help

Without Lenders

New Requests

New Requests with History

Pending

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Title	Req. No.	Lender	Patron Name	Category	Status	ccc
Agatha Heterodyne & the Airship City : a gaslamp fantasy with adventure, romance & mad science	2099588	19AD (North Lake Public Library)		Guest	Pending	

Alright, next are the changes to tablesorter. This is the one we goofed on and didn't include in our update notes -- again, sorry about that. This turned out to be a pretty big change, and there are some bugs that are affecting the functionality of the new tables, so I'll go over all that. This new tablesorter functionality pushed out updates to most ILL admin pages, and some lesser-used admin pages as well. The first new features we'll go over are in the top yellow row -- you can use those arrows to move around from page to page, if there are multiple pages. The inner arrows go to the previous or next page, and the outer arrows jump to the very first or very last pages. You can also choose the exact number page you'd like to go to from the drop down on the left, and from the drop down on the right you can select how many items display on the page. And for the next change in the lower yellow row, previously there was a link for each letter of the alphabet and you could click the b, for example, to go to all titles beginning with b. Now, you can just start typing in the box below each column and it'll pull up all items beginning with those letters or numbers. Just as a heads up, it's only searching what each entry begins with, so if I search for "north lake" in the lender column nothing will come up -- it has to be what the field starts with, so I'd need to type in 19AD to get that to display.

A couple bugs that have come up in the tablesorter -- there's a Category column that shouldn't be displaying on the borrower's pending list, that's the blue column on the left here, and it's causing a lot of confusion as it doesn't actually reflect how the request was created. You can select the gear icon, highlighted in red there on the right, to hide that column for now, before AG pushes out a release to remove that column completely from view. There's also another random column highlighted in blue

on the right that you might have seen -- it's mysteriously named the "ccc" column -- this one is also going away. Another issue, if you paste something really long into one of the search boxes, like a long title, nothing will come up. For now, if you're working with a long title, make sure to truncate it in that search box if it seems like it should be coming up in your list but isn't. Auto Graphics is planning on doing a bug fix release that should take care of both of these problems and any that were mentioned on earlier update slides. We don't have a date or time for this yet but they said it should happen by the end of August. They've also fielded several concerns about some columns that went away in the tablesorter, so they will be adding some back in, like last status change date.

Questions on the update?



Alright, now that we've gone over the update, let us know what questions you all have, either in the chat or on audio if you're connected.